CASE SUMMARY MODULE

September 16, 1999

SWSS Project
USER REQUIREMENTS

Table of Contents

1   INTRODUCTION

1.1   Purpose

"Case Summary"

Case Summary pulls data from a number of Sections, providing you with an "at – a – glance" presentation of basic information about the child.

1.2   Target Audience

The primary staff who will be interested in the Case Summary are the foster care, adoption and juvenile justice workers and supervisors who need a quick reference point of information.

The following personnel may also be interested:
- SWSS Trainers
- FIA Help desk personnel
- SWSS advance users
- SWSS project staff tasked with developing the User's guide
- Zone Children's service specialists
- ASSIST operators/CIS clerks
- Policy staff

2 MODULE NARRATIVE

Describe the business process in layman's terms. What sort of FIA staff are involved. What do they do? What forms do they deal with?

Currently, there is a paper case file in local offices with this case information. Typically, staff in the local office must have the individual case file in order to complete paper work on a case. If the staff member is absent, other staff must locate the file in order to find information on the case. It often takes significant time to find and review the case file for information.

There is face sheet, FIA-3185, for each case. It is filed in the front section of the case file on top of the legal section. However, this face sheet does not always contain the needed information.

3   NAVIGATION FLOW

3.1   Screen Interaction

How should an automated system work from the user's perspective? What types of screens are needed and how does the user interact with those screens.

The user can access Case Summary for each individual case no matter what case status the case is in, unregistered, registered, active or closed.

In Lockdown, review of Case Summary found that there are five variations of Case Summary. Event Log 278 describes the following:

1. Foster Care (JJ or Adoption) Summary, viewed by selected the Case Summary Icon at the Main Menu.
2. Case Summary/Add New, viewed from Soundex.
3. Case Detail, viewed by selected the Detail button from number 1 above.
4. Case Summary, viewed from Case Listing.
5. Companion Case Summary, viewed from Case Registration.

The recommendation made by the team in lockdown was for the fourth "Case Summary" viewed from Case Listing to be labeled "Summary". The rational for this was for the distinction from the regular Case Summary, as the Case Listing Summary has less detail. The title of "Summary" also matches the selection button on Case Listing.

3.2   System Flow

How does the data entered in this module effect the system flow within this module (or beyond the scope of this module, if appropriate). For instance, in Legal, the legal status selected determines what functions are available to the user. Also in Legal, the petition type selected determines what functions are available to the user. This may not apply to every module in SWSS.

The Case Summary is read only so this is not applicable.

4   REQUIREMENTS LIST

The comprehensive list of requirements derived from the original requirements, ensuing memos, emails, and test plan documentation.

4.1   Screen, Data, Out-of-Module, Output, Out-of-Module and Miscellaneous Requirements

The following requirements were derived from the original requirements documents written by policy staff for the SWSS project. Any ensuing memos, emails, or test plans regarding the project were also searched. It is intended to be a comprehensive list of all requirements pertaining to the Case Summary module. Each individual requirement has a unique identifier; the two letter prefix identifies this particular module (CS = Case Summary).

The list is to be used in a Requirements Traceability Matrix, which will be comprised of all the requirements for all the SWSS modules, so that the status of each requirement can be tracked and verified.

CS-1   **SCREEN REQUIREMENTS:**

CS-1.1   There must be a Case Summary screen specifically for Foster Care cases

CS-1.1.1   The FC case summary screen must display the following data elements for the current case:

CS-1.1.1.1   Last name

CS-1.1.1.2   First name

CS-1.1.1.3   Middle name

CS-1.1.1.4   Case county

CS-1.1.1.5   Case number

CS-1.1.1.6   Assigned worker's name

CS-1.1.1.7   Open date

CS-1.1.1.8   Secondary worker (if any)

CS-1.1.1.9   Commitment date

CS-1.1.1.10   Medical alert (y/n) (not for phase 1)

CS-1.1.1.11   Client ID

CS-1.1.1.12   DOB

CS-1.1.1.13   Age in years, or months if less than a year old (append "mos." to age in this case)

CS-1.1.1.14   Sex

CS-1.1.1.15   Handicaps (list them out)

CS-1.1.1.16   Race (described, not the code)

CS-1.1.1.17   Living arrangement

CS-1.1.1.18   Social security number

CS-1.1.1.19   Legal status

CS-1.1.1.20   Funding source

CS-1.1.1.21   Goal

CS-1.1.1.22   Goal status

CS-1.1.1.23   USP Due date

CS-1.1.1.24   Funding redetermination date

CS-1.1.1.25   Provider name/Parent's name

CS-1.1.1.25.1   The above is determined by the living arrangement, so that if the living arrangement is "own home" the names and address returned should be those of the parents.

CS-1.1.1.26   Provider address

CS-1.1.1.27   Provider city, state, and zip code

CS-1.1.1.28   Provider phone number

CS-1.1.1.29   Provider number

CS-1.1.1.30   Date place

CS-1.1.1.31   Length of current placement

CS-1.1.1.32   Number of placements for the current child

CS-1.2   There should be a case summary screen specifically for Adoption cases

CS-1.2.1   The adoption case summary screen should display the following data elements:

CS-1.2.1.1   Last name

CS-1.2.1.2   First name

CS-1.2.1.3   Middle name

CS-1.2.1.4   Case county

CS-1.2.1.5   Case number

CS-1.2.1.6   Assigned worker's name

CS-1.2.1.7   Open date

CS-1.2.1.8   Secondary worker (if any)

CS-1.2.1.9   Commitment date field must be blank

CS-1.2.1.10   Medical alert (y/n)

CS-1.2.1.11   Client ID

CS-1.2.1.12   DOB

CS-1.2.1.13   Age in years, or months if less than a year old (append "mos." to age in this case)

CS-1.2.1.14   Sex

CS-1.2.1.15   Handicaps (list them out)

CS-1.2.1.16   Race (described, not the code)

CS-1.2.1.17   Living arrangement

CS-1.2.1.18   Social security number

CS-1.2.1.19   Legal status

CS-1.2.1.20   Funding source

CS-1.2.1.21   Goal

CS-1.2.1.22   Goal status

CS-1.2.1.23   USP Due date

CS-1.2.1.24   Funding redetermination date

CS-1.2.1.25   Provider name/Parent's name/Adoptive Parents Name

CS-1.2.1.25.1   The above is determined by the living arrangement, so that if the living arrangement is "adoptive home" the names and address returned should be those of the adoptive parents, and if the living arrangement is "own home" the names and address returned should be those of the parents.

CS-1.2.1.26   Provider address

CS-1.2.1.27   Provider city, state, and zip code

CS-1.2.1.28   Provider phone number

CS-1.2.1.29   Provider number

CS-1.2.1.30   Date placed

CS-1.2.1.31   Length of current placement

CS-1.2.1.32   Number of placements for the current child

CS-1.2.1.33   Supervising Agency Information

CS-1.2.1.33.1   If the supervising agency is a private child placing agency, the name of the agency must be displayed.

CS-1.2.1.33.2   If the supervising agency is an FIA local office, display FIA.

CS-1.3   There should be a case summary screen specific to Juvenile Justice cases.

CS-1.3.1   The following data elements should display on the Juvenile Justice case summary screen:

CS-1.3.1.1   Last name

CS-1.3.1.2   First name

CS-1.3.1.3   Middle name

CS-1.3.1.4   Case county

CS-1.3.1.5   Case number

CS-1.3.1.6   Assigned worker's name

CS-1.3.1.7   DOB

CS-1.3.1.8   Age in years

CS-1.3.1.9   Sex

CS-1.3.1.10   Medical alert (y/n)

CS-1.3.1.11   Race

CS-1.3.1.12   Security level

CS-1.3.1.13   Handicap

CS-1.3.1.14   Living arrangement

CS-1.3.1.15   Social security number

CS-1.3.1.16   Acceptance date

CS-1.3.1.17   Commitment date

CS-1.3.1.18   Court of jurisdiction

CS-1.3.1.19   Legal status

CS-1.3.1.20   Productivity status

CS-1.3.1.21   Victims rights (y/n)

CS-1.3.1.22   USP Due date

CS-1.3.1.23   Funding redetermination date

CS-1.3.1.24   Provider name

CS-1.3.1.25   Provider number

CS-1.3.1.26   Placement contact name

CS-1.3.1.27   Placement contact phone number

CS-1.3.1.28   Date placed

CS-1.3.1.29   Number of placements

CS-1.4   There should be non-specific case summary screen displaying details about members, companions, and linked cases

CS-1.4.1   The Case Detail screen should display the following data elements about any case:

CS-1.4.1.1   Last name

CS-1.4.1.2   First name

CS-1.4.1.3   Middle name

CS-1.4.1.4   Case number

CS-1.4.1.5   Assigned worker's name

CS-1.4.1.6   Client ID

CS-1.4.1.7   Social Security Number

CS-1.4.1.8   Open Date

CS-1.4.1.9   Close Date

CS-1.4.1.10   Legal Status

CS-1.4.1.11   Date of birth

CS-1.4.1.12   Age in years, or months if less than a year old (append "mos." to age in this case)

CS-1.4.1.13   Sex

CS-1.4.1.14   Race

CS-1.4.2   The Case Detail screen should display the following data elements about members in the case:

CS-1.4.2.1   Last Name

CS-1.4.2.2   First Name

CS-1.4.2.3   Date of birth

CS-1.4.2.4   Relationship to child

CS-1.4.3   The Case Detail screen should display the following data elements about companions (if any) in the case:

CS-1.4.3.1   Last Name

CS-1.4.3.2   First Name

CS-1.4.3.3   Date of birth

CS-1.4.3.4   Social security number

CS-1.4.3.5   Client ID

CS-1.4.3.6   Log ID

CS-1.4.4   The Case Detail screen should display the following data elements about linked cases[1] (if any) to the current case:

CS-1.4.4.1   Case county

CS-1.4.4.2   Case name

CS-1.4.4.3   Log id

CS-1.4.4.4   Program

CS-1.4.4.5   Legal status

CS-1.4.4.6   SWSS Case Status (unregistered, registered, etc.)

CS-1.4.4.7   Link type (soundex prefill or CPS transfer)

CS-1.4.5   The members that are displayed for a closed Adoption case must only be those with a relationship of Adoptive parent or Adoptive sibling unless the user has central office security clearance to see all of the original members of the case.

CS-2   DATA EDITING REQUIREMENTS:

CS-3   OUT-OF-MODULE REQUIREMENTS:

CS-4   MODULE REQUIREMENTS:

CS-4.1   All data is displayed as read-only; i.e., nothing can be edited

CS-4.2   Case Summary screen is available to any user with access to the program type of the selected case.

CS-4.3   All coded elements are to displayed with the code definition, rather than the code itself

CS-4.4   If a linked case in the Linked Cases grid on the Case Detail screen is double-clicked, the main menu should be displayed with the linked case's log id prefilled in the Log ID field. This implements a rudimentary "continuum of care" feature.

CS-4.5   If a companion case in the companion group grid on the Case Detail screen is double-clicked, the main menu should be displayed with the companion case's log id prefilled in the Log ID field. This will allow a worker to more easily navigate between the companion case in a companion group.

CS-4.6   If the user performs an action upon the database after the database has timed the user out, SWSS must automatically reconnect to the database and continue working.

CS-4.7   Central Office users (county 84) need inquiry access for case information.

CS-5   OUTPUT REQUIREMENTS:

CS-5.1   Each of the forms should be printed as displayed.

CS-6   MISCELLANEOUS REQUIREMENTS:

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[1] Linked cases are any two cases that are associated with each other, but do not share information. Currently, the only way to link cases is to split companion cases.

5 EXAMPLE OUTPUT

Gather and include the forms and letters generated by this module. If possible, mark up the examples to explain the data fields to show the source or whether or not it is required.

None.

6   DATA ELEMENT DESCRIPTIONS

A table of all the data elements entered within this module. For each item, describe its range of acceptable values. Designate items as being required for ASSIST, CIS, LICENSING or AFCARS (and any combination thereof). Also describe what other modules check these values.

Show validation tables of combinations of data. Are there data dependencies?

7 HELP MESSAGES

There are to be three levels of help available: Screen, which describes how the process for the current module is supposed to work, Context-Sensitive, which describes a particular data field on the screen, and Status Panel, which offer hints about the field or command button with the current focus.

7.1 SCREEN (Section or Module level. Offers an entry point to the big help file.)

7.2 CONTEXT-SENSITIVE ("F1", a.k.a. "detail")

7.3 STATUS PANEL MESSAGES (formerly known as "Field Level" and "Baby" before that.)

Module: Case Summary

Field	New Message
Detail	Select to view detail
Comments	Select to view comments
Close	Select to close
Case Detail	Select to view
Companion Case	Select to view
Linked Cases	Select to view
Close Detail	Select to close
Comments	Select to view comments
Close	Select to close

8   MODULE DEPENDENCIES

This module is dependent on information entered or converted into modules connected through the Auto Flow process.

9   SCENARIOS

The requirements scenarios that call for data entered by this module. This is just a cross reference into the

10 TEST PLANS

The updated test plans written by the Program Office and/or the developer to verify the correctness of the finished application.

11 SOURCE MATERIAL

The following items are included for historical purposes only. The current requirements were derived from this source material, and are, in places, out of date, incorrect, or conflicting.

11.1 Original Requirement

The following pages are the original requirements for adoption, foster care and juvenile justice Case Summary.

CaseSumAdo1

CHILDREN'S *SWSS*
REQUIREMENTS FORM

Assigned Policy Analyst:	Jerome Colwell
Date Received by BuIS:	3-26-97
Requirement # (from BuIS)	P-8

TOPIC: Adoption Case Summary Screen

1. **BUSINESS PROCESS.** *Describe the current business process for the requested enhancement. Be specific. Include all forms, documents, letters, and services manual policy related to the procedure. Prior to completion of this form, discuss this process with the pilots to determine how this procedure is done in their county. Resolve discrepancies and work out any conflicts with current policy.*

There is no current Adoption application within SWSS. Information on each case is kept in a paper file.

2. **SWSS INTEGRATION.**

The Adoption Case Summary Screen will be the same screen used by Foster Care, with the addition of two fields and a change of heading for Placement Name. These new fields are County of Commitment and Commitment Date. They will be grayed out on the Foster Care Screen and will only appear on the Adoption Workers Screen. This screen, as in Foster Care can be printed or just viewed on the screen. Please see attached page 1 for layout of this screen. All fields will be display only. Information will be filled from existing fields on designated screens.

3. **DATA ELEMENTS.**

COUNTY OF COMMITMENT	From the Adoption Legal Screen. This will be grayed out on the FC Screen.
COMMITMENT DATE	From the Adoption Legal Screen. This will be grayed out on the FC Screen.
ADOPTIVE PARENTS NAME	From the Adoption Placement Screen, if Living Arrangement 04- Adoptive Home then heading of Adoptive home (see attached page 3). If Living Arrangement 01- Own Home (FC) then Parents Name (see attachment 4). All other LA can have heading Provider Name (see attached page 1).

4. **EDITS.**

Element Name	Edit Description

5. **OUTPUTS.**

6. POLICY.

The manual currently speaks of the referral to Adoption as needing to be within 10 days of permanent wardship. It will need to reflect that in SWSS we will consider this to be the Date of Commitment, otherwise we have no date in SWSS to key this action off of (see attached page 2).
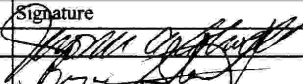
7. TRAINING.

Workers and Supervisors will need to be trained in the process of referring a case for Adoption. It is this process that will allow us to separate Foster Care and Adoption activities and information dissemination.

8. DEPENDENCIES.

The separation of the FC and Adoption Case Summary are dependent upon the ability to assign the Adoption Worker to the case while still active to Foster Care. This process could be done by the FC worker upon entering the date of commitment (on the Legal Screen). We then give them a pop-up box which ask them if they wish to make a referral to the Adoption Supervisor. If yes, then give a list of Adoption Sups. They choose the correct Sup. This then creates a tickler for the Adoption Supervisor that an assignment must be made on this case. The Worker phones or E-mails the Sup. to let them know of the referral. The Adoption Sup. selects the icon for the Central Server. On the Central Server will be an Adoption Menu. On this menu they will select a case list, on which the unassigned cases will be at the top. They select the appropriate case and then choose Adoption Assignment. This will give them an assignment screen for this case. The Sup. assigns this case to an Adoption Worker. This action will then add the Adoption Worker to the Foster Care case as the Secondary Worker (Secondary Worker is not to be confused with the term Alternate Worker). This process will be dependent upon the use of a Central Server which will link Adoption Supervisors and Worker to specific counties for a particular case.

7. SIGNATURES.

	Signature	Date
Policy Analyst:		3/26/97
Policy Supervisor:		3/26/97

MICHIGAN DEPARTMENT OF SOCIAL SERVICES	ITEM 722	PAGE 70
SERVICES MANUAL CHILDREN AND YOUTH	PROGRAM FOSTER CARE	DATE Rev. 11-6-89 Eff. 12-11-8 SM 89-8

POST-PLACEMENT
DICTATION
(Cont'd)

Agency Rule 281 and may be incorporated in an updated service plan:

1. Reason for termination:

2. Location of child:

3. Summary of services provided during care:

4. Assessment of child's needs and the parent(s) needs still to be met.

5. A statement that the termination has been explained to:

    a. The child in a manner consistent with his/her capacity to understand.

    b. The parent(s), the foster parents, the referring agency, and the person(s) assuming custody of the child.

6. Provision for follow-up services.

7. A summary explaining circumstances if an unplanned termination.

8. Medical information must be given to the parents at this time as indicated in Licensing Rule 267.

FOSTER CARE/
ADOPTION

Within 10 working days of permanent wardship of children currently supervised by the Department, the foster care worker is to make a referral to the MDSS adoption supervisor responsible for providing adoption services to the county for purpose of a permanency planning review. This referral shall consist of the most recent Initial or Updated Service Plan completed following permanent wardship. In those instances where the Department has just assumed responsibility for a permanent ward, the foster care worker is to make a referral to the MDSS adoption supervisor within 10 working days of the Initial Service Plan. It is recognized that appeal periods may delay an adoptive placement. However, referral to the MDSS adoption supervisor is not to be delayed pending appeal.

File   Foster Care Screens   Modules   Help   Log No. 00003846   User 42002004

CASE SUMMARY

LAST NAME ███   **FIRST** ███   **MI** A   **COUNTY**   Kent

CASE NUMBER k███g   **ASSIGNED WORKER** ███████

OPEN DATE 09/12/96   **SECONDARY WORKER** ████

COMMITMENT DATE   11/23/96   **MEDICAL ALERT**   Yes

DOB   09/18/1991   **AGE**   5   **SEX** Female

RACE   White (non-migrant)   **HANDICAP** None

SOCIAL SECURITY #: ██████   **RECIPIENT ID #:** █████

SCHOOL ATTENDING ██████   **LIVING ARRANGEMENT**   Foster Home- FIA

LEGAL STATUS   Temp Court Ward Neglect   **ADOPTIVE PARENTS** ████████

FUNDING SOURCE   ADC-f   **PROVIDER NUMBER** █████

GOAL   Return Home   **DATE PLACED**   11/19/95

GOAL STATUS Goal not acheived-service continuing   **LENGTH OF CURRENT PLACEMENT**   99 **DAYS**

NUMBER OF DAYS TOWARD GOAL 99   **NUMBER OF PLACEMENTS**   3

Need to add address and phone number to this.

Living Arrangement 04- Adoptive Home

CHILDREN'S *SWSS*
REQUIREMENTS FORM

asum aSFC 1

Assigned Policy Analyst:	Jerome Colwell
Date Received by BuIS:	1-31-97 (2/28/97)
Requirement # (from BuIS)	R-3

TOPIC: Foster Care Case Summary

1. **BUSINESS PROCESS.** *Describe the current business process for the requested enhancement. Be specific. Include all forms, documents, letters, and services manual policy related to the procedure. Prior to completion of this form, discuss this process with the pilots to determine how this procedure is done in their county. Resolve discrepancies and work out any conflicts with current policy.*

The current Foster Care Case Summary Screen (D04) is written in character base format. With the new application being done in a GUI format it gives us a little more opportunity to display information that will be more extensive and give the user a snap shot of the case, within one screen.

Those counties who do not have a SWSS Foster Care application must sift through a file in order to gather information which we can present in the case summary.

2. **SWSS INTEGRATION.**

The SWSS Case Summary Screen will be a display only format. No information will need to be entered by the worker, it will be taken from information already gathered within SWSS. The worker will access this screen by selecting CFC Case Management Menu and highlighting D04-Case Summary. Then press the num-enter key or double click on Case Summary (see attached page 2).

The current SWSS Case Summary Screen and the proposed SWSS Case Summary Screen can be seen on attached page 1. The new screen will be a GUI format, similar to the Child Data Screen seen on attached page 3. There will be no entry fields and it will be a display only screen. The worker can choose to print the screen by choosing this option from the file menu at the top of the screen.

3. **DATA ELEMENTS.**

CASE NAME	Last name 18 characters, First name 15 characters, and middle initial 1 character. This information would be taken from the Child Data Screen.
COUNTY NAME	Name of the County of Commitment. From the Legal Screen Grey this out on the Foster Care screen. For Adoption purposes.
CASE NUMBER	This is a nine character field, beginning in a alpha character with 7 numeric characters and ending in an alpha character. This will be taken from the C02-Child Data screen. Case # (ANNNNNNNA)
ASSIGNED WORKER	This is a 35 character maximum field. It is the alpha representation of the name not the load number. It can be obtained from the Child Data Screen to get the load number and then the name can be found in the worker table.

SECONDARY WORKER	This is a 35 character maximum field. It is the alpha representation of the name not the load number. It can be obtained from the Child Data Screen .
OPEN DATE	This field already exists on the Case Summary screen and will continue as is. Open Date (MMDDYYYY).
COMMITMENT DATE	From the Legal Screen, for Adoption use. Grey out for Foster Care Worker.
MEDICAL ALERT	From the Medical Screen, yes or no.
DATE OF BIRTH	Information taken from the Child Data Screen. (MMDDYYYY)
AGE	The current Case Summary Screen calculates the age from DOB, this would remain the same.
SEX	From the Child Data Screen, maximum six characters.
RACE AND HANDICAP	The alpha representation of the code listed on the Child Data Screen, maximum of 35 characters for Race and 40 characters for Handicap.
SOCIAL SECURITY #	From the Child Data Screen, (9 digits)
RECIPIENT ID #	From the Child Data Screen, (8 digits)
LIVING ARRANGEMENT	From the Placement Screen. Alpha representation from the code list, with a 35 character limit.
PROVIDER NAME AND NUMBER	From the Placement Data Screen, for name: (40 characters). Provider #: 9 characters (AANNNNNNN).
FUNDING SOURCE AND LEGAL STATUS	From the Placement Data Screen. These will be in alpha character with a 40 character limit for Funding Source and 35 characters for Legal Status.
DATE PLACED	From the Placement Data Screen, (MMDDYYYY).
LENGTH OF CURRENT PLACEMENT	This is the length of the current placement,from placement date until current date. Limit of 4 characters.
NUMBER OF PLACEMENTS	From the Placement Record History. Total number of placements for the youth within this foster care episode (Episode-removal date to close of FC case). 2 char.
GOAL AND GOAL STATUS	From the Child Data Screen. Goal represented in the alpha character with a 40 character limit and Goal Status alpha representatation, limit 40 characters.
NUMBER OF DAYS TOWARD GOAL	Date of Goal, from the Child Data Screen, until current date. Limit of 4 characters.
SCHOOL ATTENDING	From the Education Screen, limit 35 characters. If Truant or expelled, list as such (see attached page 4). If expelled also list reason (see attached page 5).
ADDRESS AND PHONE NUMBER OF PROVIDER	From the Placement Screen.

4. EDITS.

Element Name	Edit Description